Logging In

- Do **not** share usernames and passwords.
- You are directed to change passwords every 90 days.

Timing Out

- The system is set to time out after one hour of inactivity. To log back in, you may need to close and re-open your browser.

Forgotten Usernames/Passwords

- If you forget your username or password, use the Forgot your User ID or Forgot your Password links on the login screen.
- To have a forgotten username emailed, you must know your user type ("Business User").
- For a forgotten password, or after two failed attempts to login, you are directed to answer 3 of your 5 challenge questions.
- After answering the challenge questions you are directed to create a new password.
- A message will display if you failed to correctly answer any of your challenge questions.
- Your account will lock after 3 failed attempts to login.

Unlocking Account

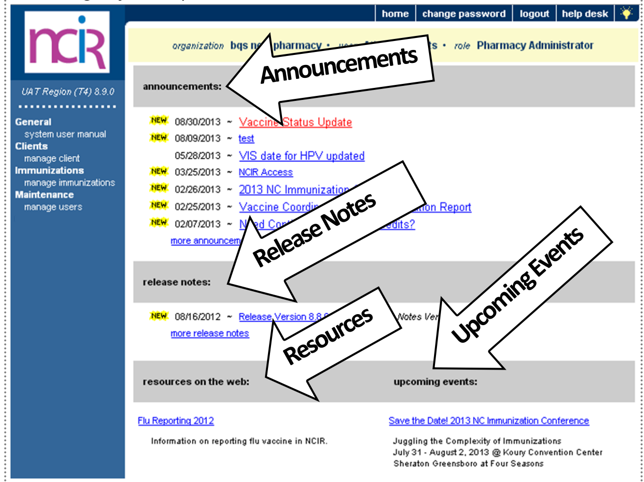
- If you lock yourself out and you know your password, you may either:
  - ⇒ Wait one hour and log in correctly.
  - ⇒ Contact the ITS Help Desk at 1-800-722-3946 (USE-NCIR) to have your account unlocked immediately.
- If you lock yourself out and no longer know your password, the ITS Help Desk **cannot** recover it. You must register for a new NCID account and username. Your Administrator must deactivate the old username and add the new one.

Deactivated Account

- If you do not log into the NCIR for 90 days, your account will be deactivated. You will need to register for a new NCID account to use the NCIR again.

Home Page

- Check for posted announcements and release notes (NCIR version updates).
- A yellow "NEW" symbol indicates that a post is unread.
- The home page contains links to information and resources, including VIS (Vaccine Information Statements) and VAERS (Vaccine Adverse Events Reporting System).



Menus

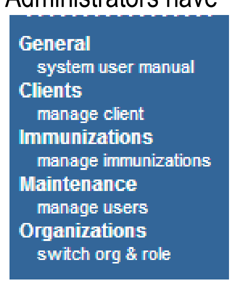
There are 2 main menus.

Blue Menu Bar at Top of Screen

- Help desk: Please contact your trainer and not the NCIR Help Desk with any questions.
- Light bulb button: This opens an online help module for whichever page you are viewing.

Blue Menu Panel on Left Side of Screen

- System User Manual: The user manual provides in-depth information/instructions.
- Manage Client: Use this option to search for a client.
- Manage Users: Only Pharmacy Administrators have this option. It is for activating users, inactivating users, and switching user roles.
- Switch Org & Role: Only users who work in multiple stores have this option. Click to switch to another store that you are active in.

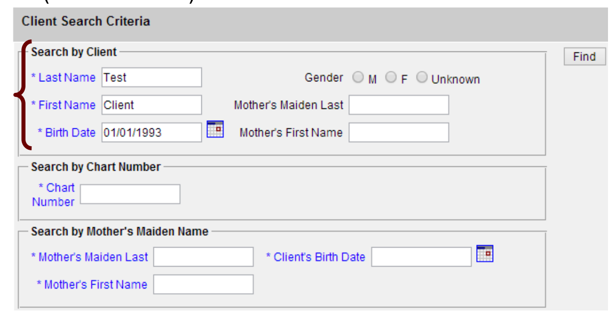


Finding/Adding Clients

Many clients are already in the NCIR!

1. Search for the client.

- From any page where you see the left menu panel, click Manage Client.
- When the "Client Search Criteria" box opens, enter the client's Last Name, First Name, and Birth Date (*shown below*).



- Click the Find button.

2. View search results to find the client.

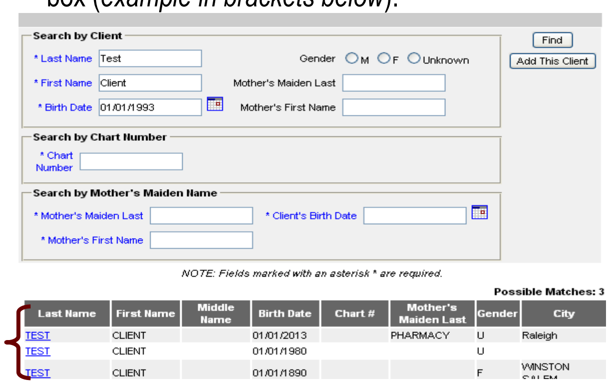
There are 3 types of search results.

Exact Match

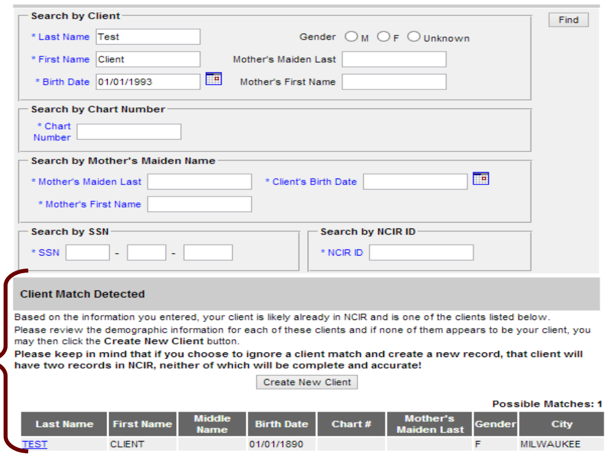
- If found, the client record opens automatically. Verify that this is the correct client.

Possible Matches

- If one or more possible clients are found, they are listed in a "Possible Matches" table below the search box (*example in brackets below*).



- If any of the possible matches are particularly close, a "Client Match Detected" message is also displayed (*example in brackets below*).



- Carefully review each possible match.
- When you find the client, click on the blue Last Name hyperlink to open the record.

No Match

- If your search found no clients, or if none of the possible matches are your client, review your search criteria for accuracy.
- Tip: For clients with a hyphenated or two part last name (e.g. Johnson-Smith), try searching for one part of the name (e.g. Smith).
- Tip: Consider whether the client could have a record under a different (or misspelled) first or last name.

3. If Not in NCIR, Add the Client.

- Click the Add This Client button at the top right (underneath the Find button).

⇒ **Note**: If your search generated a "Client Match Detected" message, you have to click the Create New Client button instead (directly below message).

About Client Records

Client records have 3 main parts/screens:

- **Edit Client screen**: For viewing, entering, and editing client personal/demographic information.
- **History/Recommend screen**: For viewing client immunization information and proceeding to screens for entering and editing doses administered.
- **Reports screen**: For printing client records.

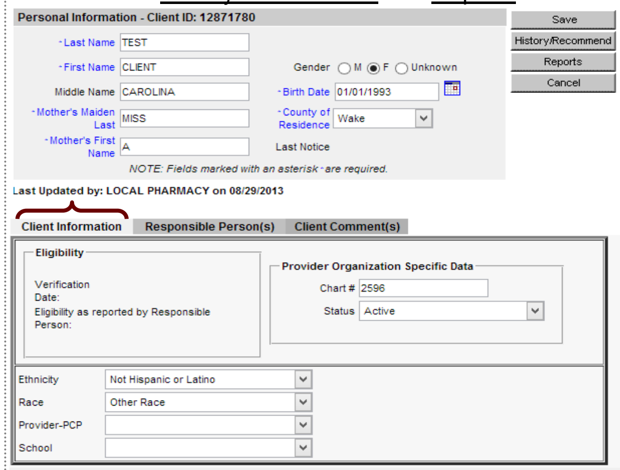
Edit Client Screen

There are 4 sections.

- One header section at the top of the screen.
- Three tabbed sections on the bottom half.
- Be sure to save any information that you enter in any of the sections.

⇒ **Note**: A "Client Match Detected" message may be displayed when trying to save a new client if the information entered closely matches that of an existing client. If sure you are not creating a duplicate record, click Create New Client to proceed.

- Contains buttons for switching to the 2 other main screens: History/Recommend and Reports.



Personal Information header

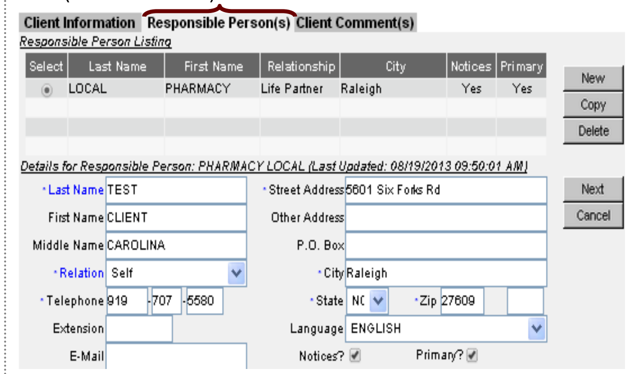
- Please fill this section out as completely and accurately as possible.
- This information is displayed on printed copies of the client's formal immunization record.
- Last Updated by indicates the last organization that updated the record and the date of that update.

Client Information tab

- This tab (*shown in image above*) is viewable when the screen opens.
- The relevant fields for pharmacy users are Ethnicity and Race.

Responsible Person(s) tab

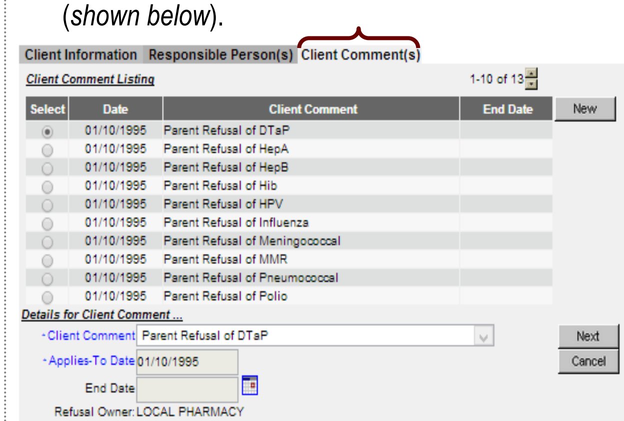
- You must click on the tab name to open this section (*shown below*).



- At least 1 responsible person should be entered, even for adults (Relation to client can be Self).
- To enter a new person, click the New button.
- To update an existing person, click the radio button next to that person's name.
- Enter/update as much information as possible.
- Click Next to load the new or edited person.

Client Comment(s) tab

- You must click on the tab name to open this section (*shown below*).



- Client Comments impact the vaccines recommended by the tracking schedule.
- You must enter an Applies-To Date. This is typically the same date as the date that you are entering the comment.
- An End Date is not a required field but should be entered if it is applicable to the client comment.

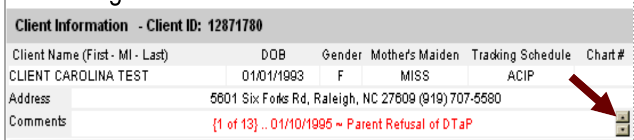
History/Recommend Screen

Immunization information is reviewed, entered, and edited within the History/Recommend screen.

- Broken into 3 sections
- Contains buttons for switching to the 2 other main screens: Edit Client and Reports.
- Contains buttons to proceed to screens for adding and editing doses administered.

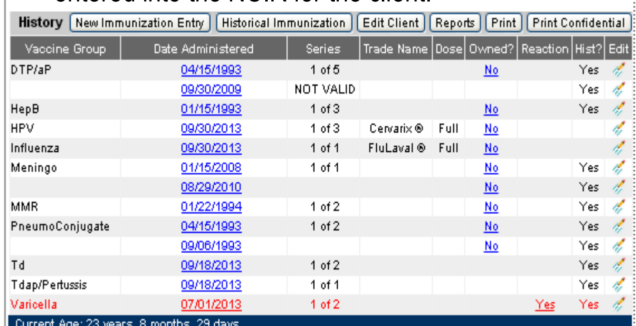
Client Information section

- Any entered Client Comments are displayed in red font. Use the down arrow (*shown below*) to click through the comments.



History section

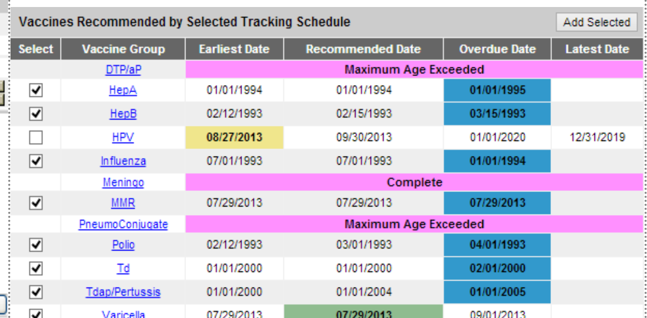
- The client's exact age is displayed in the blue strip at the bottom of this section.
- The history section lists all vaccines that have been entered into the NCIR for the client.



- The Series column denotes the sequence number of each dose within the immunization series. It also indicates if a dose is Not Valid.
- For an explanation of the status written in the Series column for a dose, click the Date Administered hyperlink. A popup window opens displaying the tracking schedule rules applied to that dose. If the dose is not valid, a written explanation is also provided.
- The Owned? column indicates whether or not your organization administered the dose. If No, you can click the blue hyperlink to see who gave the dose.
- The Reaction column indicates whether or not a reaction to the dose was reported. If Yes, you can click the red hyperlink for details.
- The Hist? column indicates whether or not the vaccine was recorded as a historical dose (i.e. given using inventory that was not tracked in the NCIR).
- The Edit column opens a screen for editing/deleting the dose. See the "Editing Doses" section for details.

Vaccines Recommended section

- Recommendations are based on client comments, immunization history entered into the NCIR, client age, and the current ACIP tracking schedule.



- A checkmark appears in the Select column next to vaccines that are recommended.
- For an explanation of the recommendations for a particular dose, click on the blue Vaccine hyperlink. A popup window opens displaying the tracking schedule rules applied to that recommendation. If contraindicated, a written explanation is also provided.
- The Date columns are color coded. For a color key, click the light bulb button while on this screen.

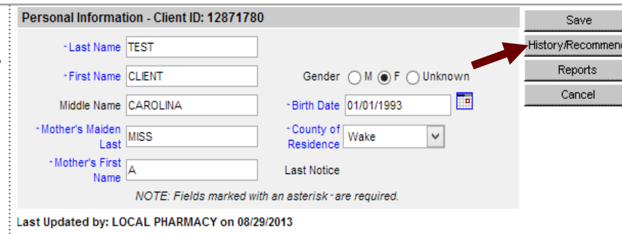
Adding Doses

Please enter vaccines administered by your store as well as shot records (from a valid certificate of immunization) brought to you by clients.

Entering Doses Administered at Your Pharmacy

1. Open the History/Recommend Screen.

- From the Edit Client screen, click the History/ Recommend button (*shown on the following image*).

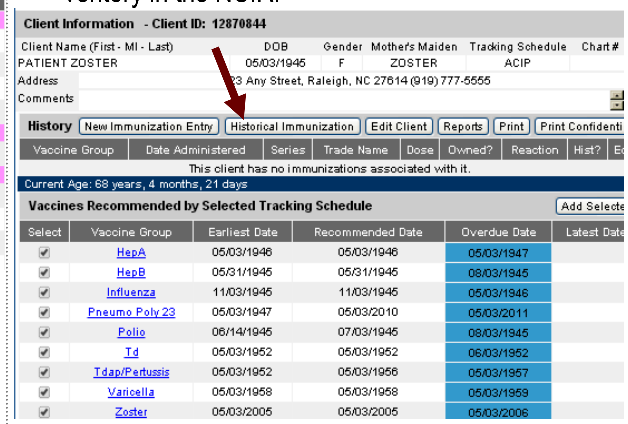


2. Review the History/Recommend Screen.

- For details, see the "History/Recommend Screen" section.

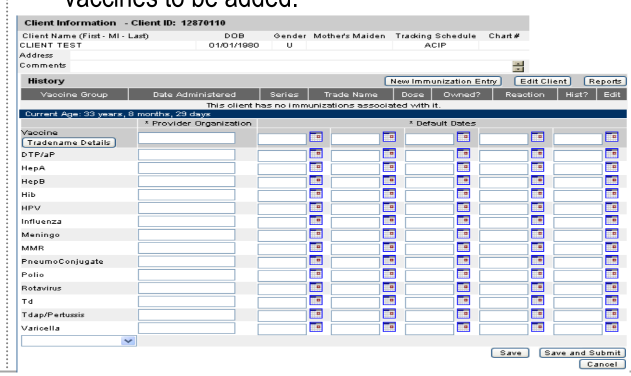
3. Click Historical Immunizations.

- Note: Pharmacy users always enter doses administered by clicking the Historical Immunizations (*shown below*). This is because pharmacies do not track inventory in the NCIR.

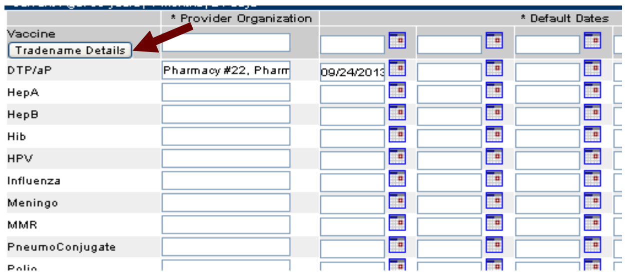


4. Enter Doses Administered.

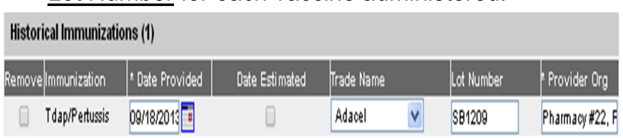
- When the screen for entering doses opens (*shown below*), look in the Vaccine column for the vaccine or vaccines to be added.



- In the text box next to each vaccine that you want to add (Provider Organization column), enter store name and (if applicable) number. Also enter the name and credentials of the pharmacist who administered the vaccine. For example: *Pharmacy #12, John Smith, RPH*.
- In the next text box (the 1st date column), enter the date that the dose was administered.



- Click the Trade Name Details button (*shown above*).
- When the new screen for entering Trade Name details opens (*shown below*), enter Trade Name and Lot Number for each vaccine administered.



5. Click Save.

- You are returned to the History/Recommend screen.
- Review the history section to verify that the dose or doses were accurately added.

Entering Shot Records

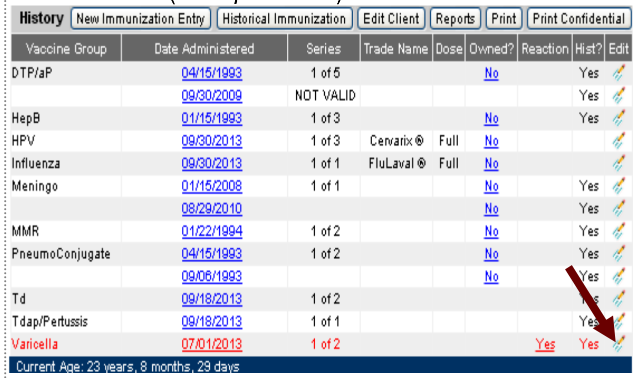
- To enter shot records, follow the same steps as for entering doses administered except you do not need to enter Trade Name or Lot Number.
- Instead of clicking the Trade Name Details button, click Save and Submit to return to the History/ Recommend screen.
- Note: You are able to enter multiple vaccines on this screen as well as multiple doses of a single vaccine (by entering the date of each dose In the date columns next to that vaccine).

Editing Doses

You may edit or delete a historical dose as well as record a reaction to a dose.

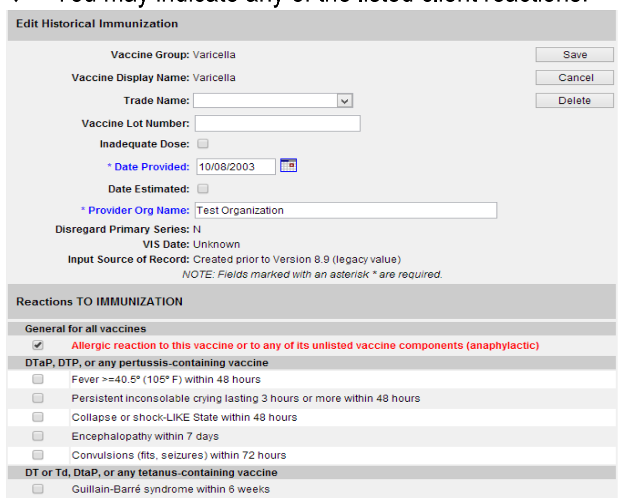
1. From the History/Recommend screen, find the dose that needs to be edited.

- Click on the notebook button in the Edit column of that dose (*example below*).



2. Edit or delete dose.

- When the new screen opens, you may edit information including Provider Organization Name, Date Provided, and Trade Name details.
- You may indicate any of the listed client reactions.

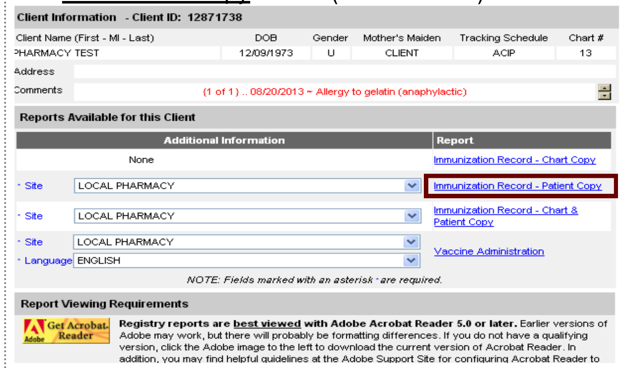


- After editing, click the Save button.
- To delete the dose, click the Delete button and then select OK to confirm.

Printing Client Records

Client records are printed from the Reports screen. The patient copy fulfills the requirements for an official certificate of immunization.

- From either the Edit Client or History/Recommend screen, click the Reports button.
- When the screen opens, click the Immunization Record- Patient Copy button (*shown below*).

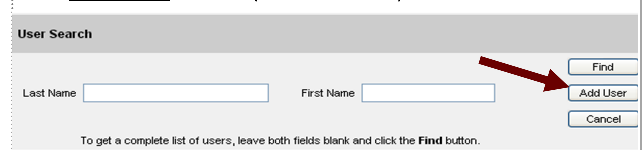


- The client record will open as an Adobe PDF file.
- Print the record.
- Click the back button in your browser window to return to the “Reports” screen.

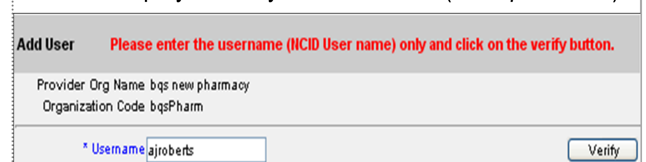
Adding Users

This is only applicable to users with a Pharmacy Administrator Role. To add an employee as a user, you must know the employee’s username (NCID user ID).

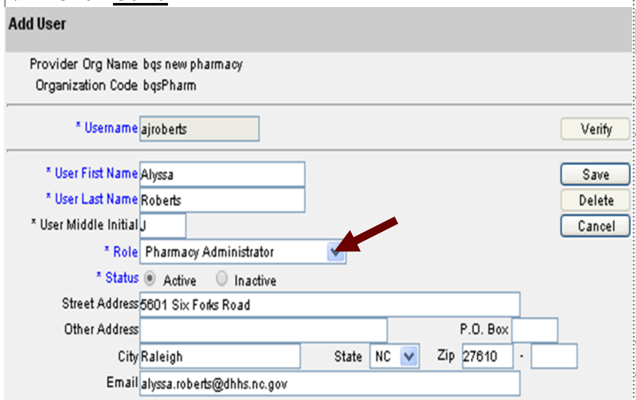
- From any page where you see the left menu panel, click on Manage Users.
- When the User Search screen opens, click on the Add User button (*shown below*).



- In the Username blank, enter only the username of the employee that you want to add (*example below*).



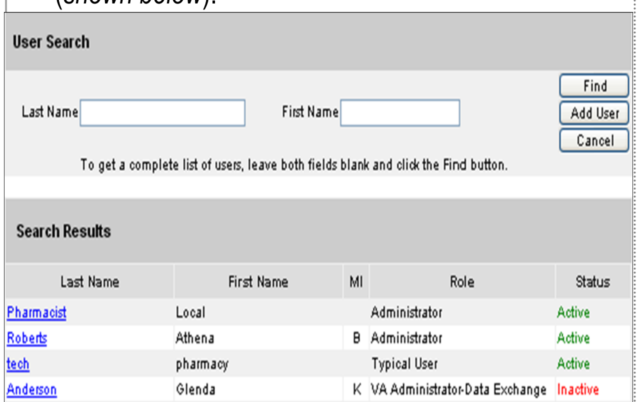
- Click the Verify button.
- The user's information populates the boxes on this screen. Click the Role dropdown menu (*example below*) and assign either a Pharmacy Administrator or Pharmacy Typical User role.
- Click Save.



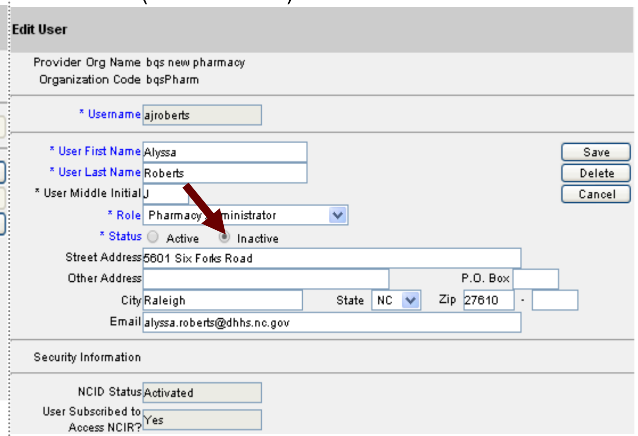
Editing Users

This is only applicable to users with a Pharmacy Administrator Role. To change a user's role or to inactivate a user, follow the instructions below.

- From any page where you see the left menu panel, click on Manage Users.
- When the User Search screen opens, click on the Find button.
- A complete list of active and inactive users for your organization will appear in a list below the search box (*shown below*).



- Click the blue underlined Last Name of the user that you want to edit.
- When a screen with the user's information opens, you may make edits.
- To inactivate a user, click the Inactive Status radio button (*shown below*).



- Click the Role dropdown menu to switch the user's role.
- Click Save after any changes.